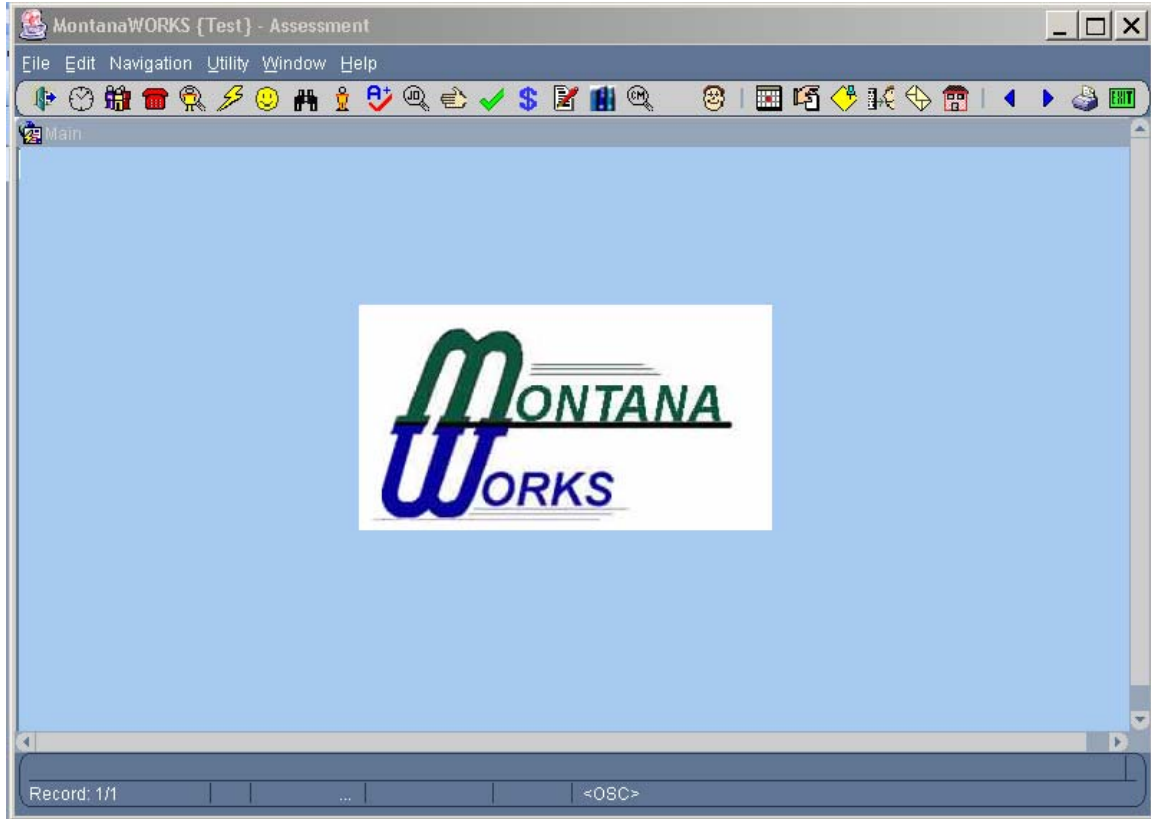


Employment Plan Screens

In this Section, you will:
Develop an Employment Plan
Add Services to a seeker/participant

Splash screen






To get to this screen, click on the Employment Plan Button on the toolbar.

Employment Plan Screen Enrollment Tab

You have until midnight of the day you enroll someone into a WIA program to hit the Oops button and the system will de-enroll the participant.

The screenshot shows the 'Employment Plan - SUSIE HOME MAKER(999-06-8266)' window with user 'Carol Evanger (406)542-5763'. The 'Enrollment' tab is selected. The 'Possible Enrollments' section has a table with columns: Program, Date, Close Dt, and Comments/Outcome. The 'Eligible Enrollments' section includes 'Montana/Works Eligibility' and 'Other Potential DLI Programs' lists. The 'Actual Enrollments' section has a table with columns: Program, Start Dt, End Dt, and Outcome. A red arrow points to the 'Oops!' button in the 'Actual Enrollments' section. At the bottom, there are buttons for 'Providers', 'Print Agreement', 'Print EO Notice', 'Save', and 'Cancel'.

The  Providers button on this screen is the Montana list of Eligible Training Providers. For informational purposes only.

You can also use the  Print Agreement and the  Print EO Notice buttons to print the Participant Agreement and EO Notice forms.

Employment Plan Screen Employment Plan Tab

This is where you will ADD SERVICES!!

Document3 - Microsoft Word

MontanaWORKS (Test) - Employment Plan

File Edit Navigation Options Utility Window Help

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Show Closed Services Show Closed Tasks EO Notice: Plan: 1 of 1

Start Date: 05/10/07 Closed: ONet: Goal: Justification: LMI

Objective: Start Date: 05/10/07 Hours: Authorize Add Task Del Task Del Service

End Date: Outcome: Comments: Schedule Print Plan New Plan Del Plan Save Cancel

Funding Summary Totals for All Plans Source: Obligated: Authorized: Paid: Source: Obligated: Authorized: Paid:

Start Date of the Employment plan Record: 1/1 <OSC>

Employment Plan Screen
Employment Plan Tab

Page 3 Sec 1 3/3 At 1.5" Ln 4 Col 1 REC TRK EXT OVR

start Montana State Emplo... MetaFrame Presentat... Document3 - Microsof... 3 Citrix ICA Client E... 10:56 AM

You start by putting some required information onto the plan itself.

Start Date: 05/10/07 Closed: ONet: Goal: Justification: LMI

An ONet Code, Goal, and Justification are all required fields. Double Click on "ONet" field and it will allow you to search for an ONet Code.

Goal and Justification fields are free form typing fields.

The Justification field will display on the Employment Plan when it is printed as "This is my Employment Goal Because: (whatever is typed in this field)".

Employment Plan Screen

Employment Plan Tab Continued

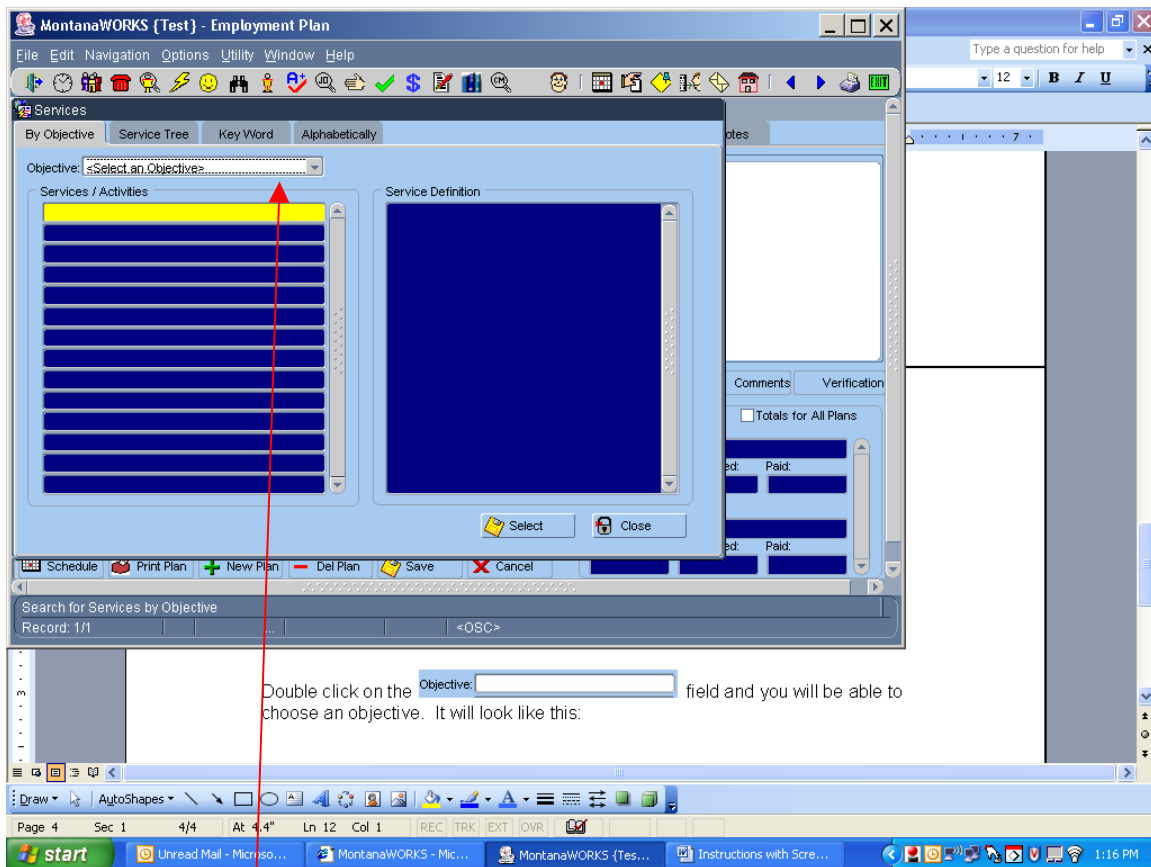
Objective: Start Date: 05/10/07

Service: Hours:

End Date: Outcome:

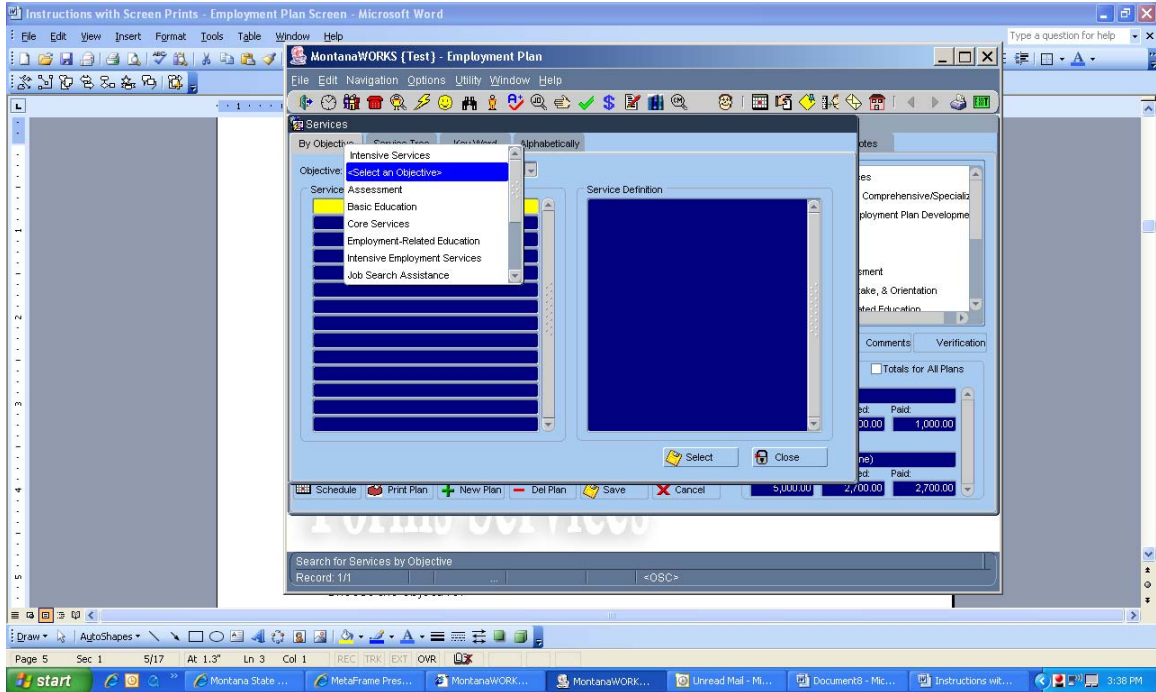
Each service that you add to the plan is categorized under an objective.

Double click on the Objective: field and you will be able to choose an objective. It will look like this:



Select the 'Objective' drop down to choose an objective. Employment Plan Screen

Employment Plan Tab Continued

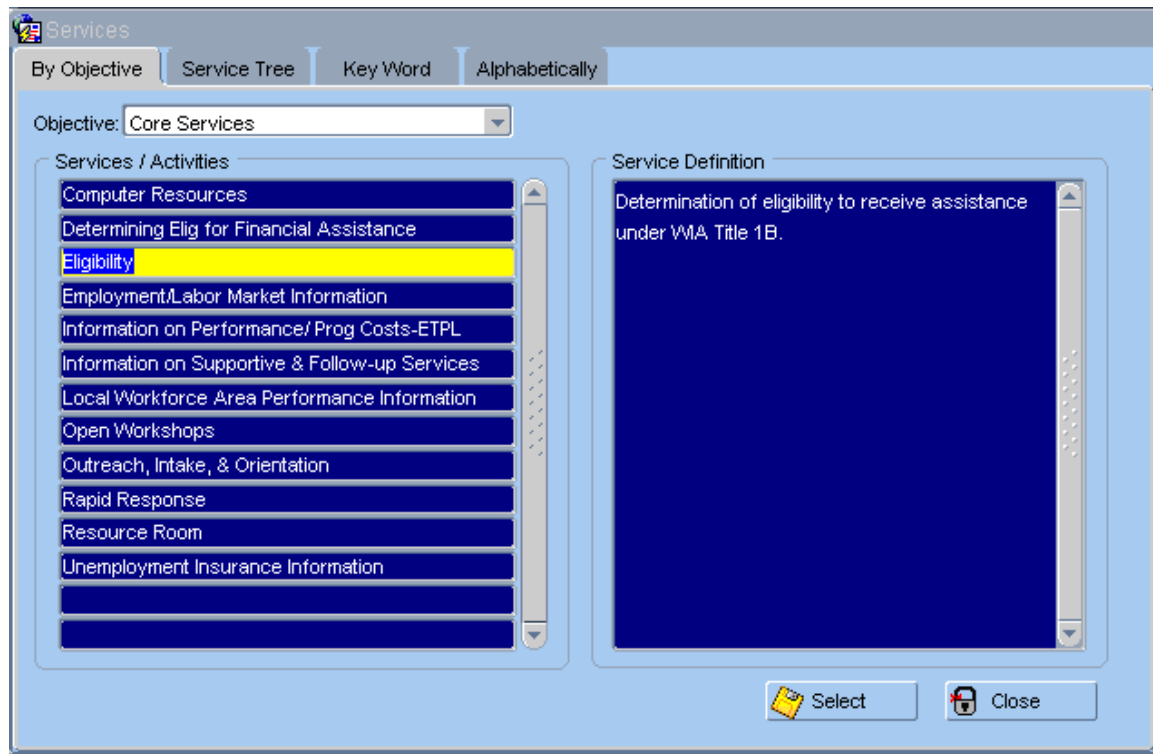


Choose the objective.

Employment Plan Screen

Employment Plan Tab Continued

For this example, I will choose "Core Services" and these are the options I have to choose from:



I will choose "Eligibility" because I determined eligibility for this person into the WIA Adult and Dislocated Worker programs.

You may have to use your down arrow to get to the services under the first row.

Notice the definition of the highlighted service in the box to the box on the right of the screen.

Click Select button.

Employment Plan Screen Employment Plan Tab Continued

This is what the screen looks like after I added the “Eligibility” service to this participant.

MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - MARCUS R SIMONSON(999-06-1448) | Suzanne Ferguson (406)444-4513

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

☐ Show Closed Services ☐ Show Closed Tasks EO Notice: Plan: 1 of 1

End Date: Outcome: Service: Intensive Services Start Date: 05/10/07 Hours: [Empty] [Authorize]

Service: Individual Employment Plan Development [Add Task] [Del Task] [Del Service]

End Date: Outcome: [Empty]

Objective: Core Services Start Date: 05/10/07 Hours: [Empty] [Authorize]

Service: Eligibility [Add Task] [Del Task] [Del Service]

End Date: Outcome: [Empty]

Objective: Core Services Start Date: 05/10/07 Hours: [Empty] [Authorize]

Service: Initial Assessment [Add Task] [Del Task] [Del Service]

[Schedule] [Print Plan] [New Plan] [Del Plan] [Save] [Cancel]

Intensive Services

- Assessment Comprehensive/Specialized
- Individual Employment Plan Development

Core Services

- Eligibility
- Initial Assessment
- Outreach, Intake, & Orientation
- Employment-Related Education

[Add Service] [Comments] [Verification]

Funding Summary ☐ Totals for All Plans

Source: TEST FUNDING

Obligated:	Authorized:	Paid:
3,500.00	1,500.00	1,000.00

Source: WIA BOS Adult (Oct - June)

Obligated:	Authorized:	Paid:
5,000.00	2,700.00	2,700.00

You can add as many tasks as necessary for any service. For this example, I will not add a task because the eligibility determination is already completed.

If the Core services have been provided by another provider, you do not have to duplicate them as a service. For example, the participant had already been searching for work with Job Service and was not successful and was then referred to WIA, the WIA case manager would not have to add all of these core services again. They would be visible in the ES portion of MontanaWORKS. You would see this on the Seeker Info screen.

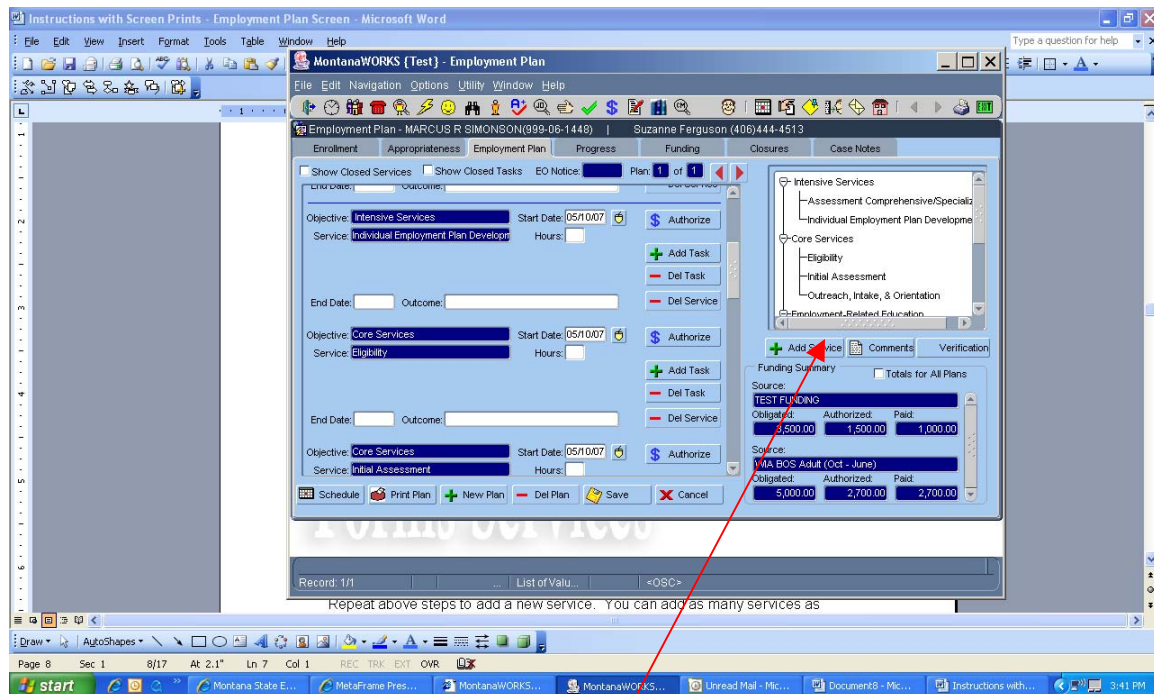
Some of the services will have the “Hours” field required (training services mostly). You would put the number of weekly hours in this field if necessary.

See next screen shots for an example of using the tasks function.

Employment Plan Screen

Employment Plan Tab Continued

I will add a training service and have a couple of tasks associated with that service.



To add a new service, click the  button.

Repeat above steps to add a new service. You can add as many services as you need.

You must still add Core, Intensive, and Training services as necessary. Montana still tracks services as Core, Intensive, and Training services.

Employment Plan Screen

Employment Plan Tab Continued

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - MARCUS R SIMONSON(999-06-1448) | Suzanne Ferguson (406)444-4513

Enrollment Appropriateness **Employment Plan** Progress Funding Closures Case Notes

☐ Show Closed Services ☐ Show Closed Tasks EO Notice: Plan: 1 of 1

Objective: Core Services Start Date: 05/10/07
 Service: Outreach, Intake, & Orientation Hours:

End Date: Outcome:

Objective: Employment-Related Education Start Date: 07/02/07
 Service: Occupational Skills Training Hours: 99
 Task 1: Comp: ☐

End Date: Outcome:

Objective: VIA - Other Services (ALL) Start Date: 05/10/07
 Service: Out of Area Job Search Hours:

Intensive Services
 - Assessment Comprehensive/Specializ
 - Individual Employment Plan Developme
 Core Services
 - Eligibility
 - Initial Assessment
 - Outreach, Intake, & Orientation
 - Employment-Related Education

Funding Summary ☐ Totals for All Plans

Source: TEST FUNDING
 Obligated: 3,500.00 Authorized: 1,500.00 Paid: 1,000.00

Source: VIA BOS Adult (Oct - June)
 Obligated: 5,000.00 Authorized: 2,700.00 Paid: 2,700.00

I added Occupational Skills Training as a service. You can now add tasks to that particular service. To add a task, click the button.

Objective: Employment-Related Education Start Date: 07/02/07
 Service: Occupational Skills Training Hours: 99
 Task 1: ☐
 Task 2: ☐

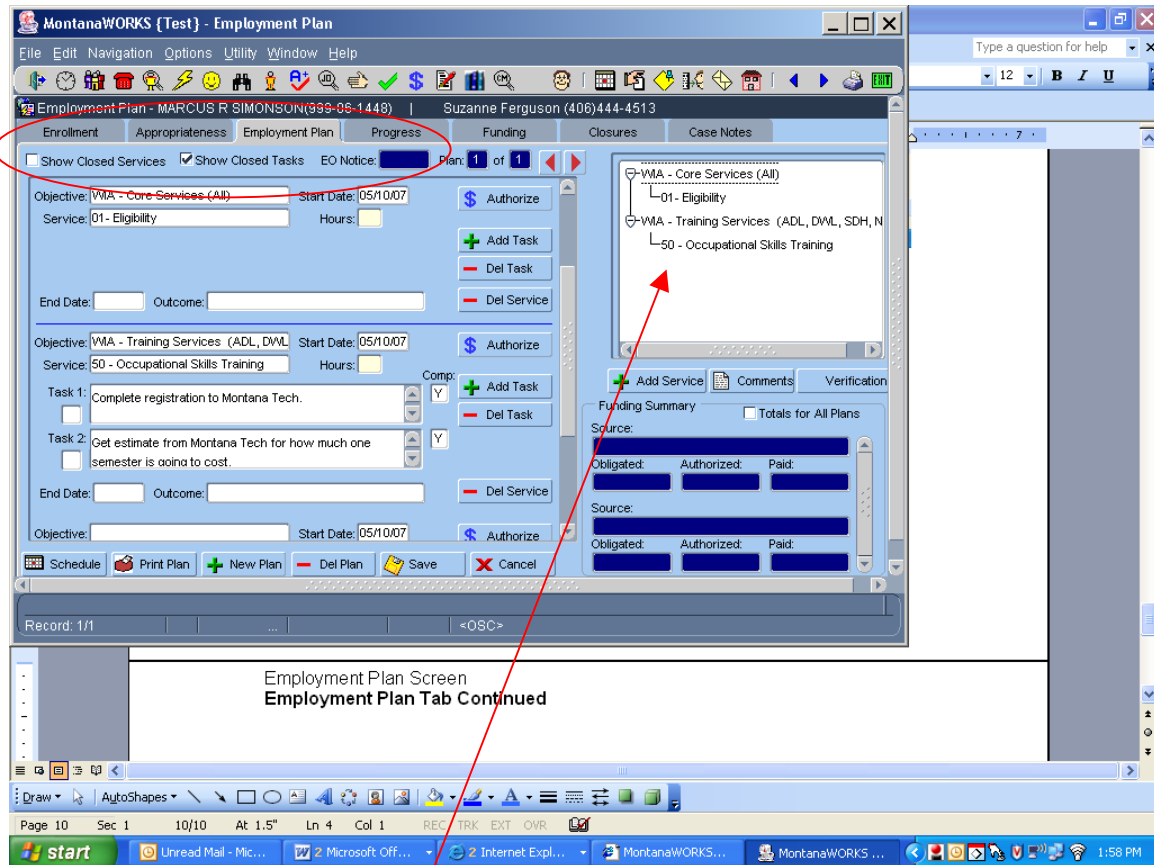
End Date: Outcome:

This is just an example of how you can use this function. When a task is complete, put a "Y" in the Comp. field.

The boxes to the left allow you to order your tasks in sequential order.

Employment Plan Screen

Employment Plan Tab Continued



Notice the

- ✓ Show Closed Services
- ✓ Show Closed Tasks

checkboxes at the top of the screen. If they are checked, you will be able to view the closed services and tasks. Otherwise they are not visible.

Also, notice the service tree on the right of the screen, this will show you the objectives and services for the participant. What displays here also depends on what you have checked to the left; show closed services.

The comment box at the end of all the services is for comments about the PLAN in general, not each service.

Comments:

Employment Plan Screen Employment Plan Tab

For Youth Participants

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Show Closed Services Show Closed Tasks EO Notice: Plan: 1 of 1

Start Date: 05/15/07 Closed: ONet: 25309999 Teachers and Instructors, All Other

Goal: I want to complete high school, attend college to become a Kindergarten teacher.

Justification: Lots of jobs out there for teachers.

Objective: WIA - Supportive Services (ALL) Start Date: 05/15/07

Service: Transportation Hours: \$ Authorize

End Date: Outcome: + Add Task - Del Task

Objective: WIA - Youth Components (YOU) Start Date: 05/15/07

Service: Supportive Services Hours: \$ Authorize

Comp: + Add Task - Del Service

Schedule Print Plan New Plan Del Plan Save Cancel

Record: 1/1 <OSC>

You must enter the applicant into at least one Youth Component. If you are going to provide supportive services to the applicant, you must also enter them into the "WIA - Supportive Services (ALL)" as a service.

Page 10 Sec 1 10/13 At 1.9" Ln 6 Col 1 REC TRK EXT OVR

start Montana State Empl... MetaFrame Present... 3 Citrix ICA Client ... Document2 - Micros... Instructions with Scr... 11:22 AM

You must enter the applicant into at least one Youth Component. If you are going to provide supportive services to the applicant, you must also add the objective, "**Supportive Services**" and then choose the appropriate service.

Employment Plan Screen
Employment Plan Tab
Closing a Service

To close a service, you double click in the **End Date:** field directly under the service. A calendar will appear for you to choose a date. You may also just type in the date.

Double click in the **Outcome:** field to select an outcome for that service.

When you close a service, you must first Complete all tasks.

Save when you are done.

Employment Plan Screen
Appropriateness Tab
For Adult and Dislocated Worker Applicants Only!!

MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Is the customer unable to achieve self-sufficiency/suitable employment in intensive services based on program requirements? (Adult only)

Have other educational grant opportunities been explored?

Is the customer able to complete the selected training?

Does the customer have a reasonable expectation of employment following completion of training?

Is the customer willing to complete the training or education as quickly as possible, taking into account individual needs, time limits, and circumstances?

Is the training available at a reasonable cost and location? (Trade only)

Completed Date: Training Services must be added to plan by: Record 1 of 0

+ Add Save Cancel

Record: 1/1 <OBS>

Employment Plan Screen
Appropriateness Tab

Page 2 Sec 1 2/2 At 1.5" Ln 4 Col 1 REC TRK EXT OVR

start Montana State Emplo... MetaFrame Presentat... Document3 - Microsof... Citrix ICA Client E...

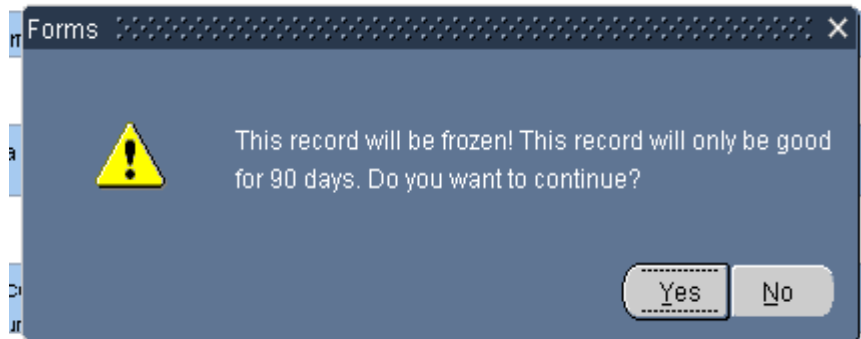
10:54 AM

Fill out this screen if the participant is going to be put into a training service.

If you answer one of the questions Yes, you will have to put a comment in the appropriate comment box.

Double Click in the Completed Date: Field and you can freeze the screen.

The following box will pop up when you Save.



Completed Date: 05/10/07 Training Services must be added to plan by: 08/08/07

Once this record is frozen, training must be added to the plan within 90 days (the date on the screen)!

If you do not add training services within 90 days of freezing this screen, you will have to complete the screen again using the Add button.

Employment Plan Screen Progress Tab

If you have put your participant in any training that provides a certificate or credential, you are required to use an Eligible Training Provider and complete this section on the **Progress Tab**.

Use this screen to record the progress of your participant through their plan. Any authorizations you have made on behalf of a participant will appear on this screen.

The notes on the **Progress Tab** will be visible to ALL users!

Employment Plan Screen Progress Tab

To add a note to this tab:

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Progress Evaluation Notes

Date	Subject	Counselor	Fltr-Dt

Select All Deselect All Print **+ Add**

Schools
School Name: Actual Start Date: Projected Completion: Actual Completion: Training Program: Show Completed Add Delete

Training Authorizations

Date	Provider	Authorized	Paid	In Full
05/17/07	CLIENT CLIENT	200.00	200.00	<input checked="" type="checkbox"/>
05/17/07	CLIENT CLIENT	1,000.00	1,000.00	<input checked="" type="checkbox"/>
05/17/07	MSU BOZEMAN	1,000.00	.00	<input type="checkbox"/>
05/16/07	MONTANA TECH	800.00	800.00	<input checked="" type="checkbox"/>
05/11/07	MONTANA TECH	700.00	700.00	<input type="checkbox"/>
Totals:		3,700.00	2,700.00	

Support Services Authorizations

Date	Provider	Authorized	Paid	In Full
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
Totals:				

Save Cancel

Record: 1/1 <OSC>

To add a note to this tab:

Click on the **+ Add** button.

This screen will appear:

Create Note for Seeker - SIMONSON, MARCUS R(999-06-1448)

Category: Progress Evaluation

Date: 05/18/07 By: Suzanne Ferguson

Subject:

Notes:

1. Based on the tasks in the plan. Is progress being made as deemed appropriate?
2. What documentation was obtained to evaluate progress?
3. If applicable, what problem solving steps were determined?

Follow-up Date:

☐ Print on Save

Save Close

Click on the dropdown in the Category field to choose a category of the note.

You will be required to enter a subject (free form field).

You can answer the questions that are provided or you can delete these questions and type in whatever you would like.


Remember that these progress notes are visible to ALL users!

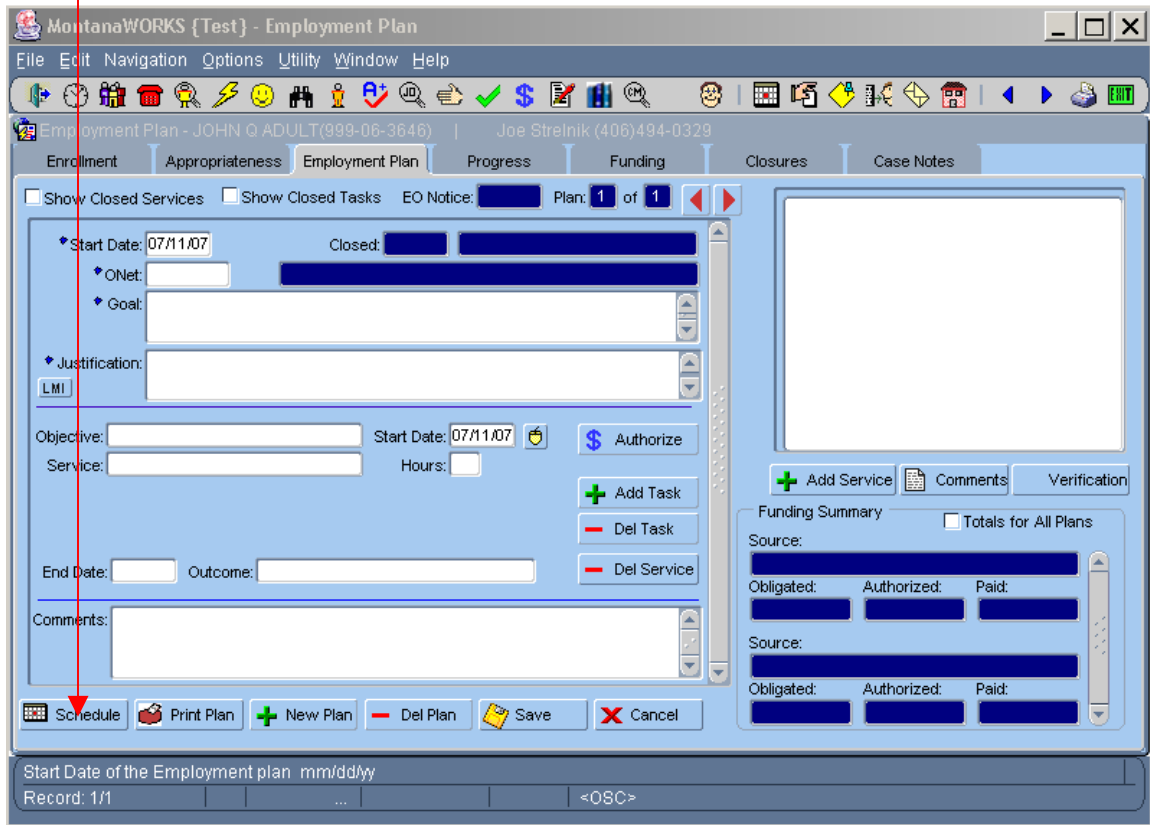
You can type in a date in the Follow-up field and the system will add a task to your scheduler!

Save when you are done.

Employment Plan Screen

Employment Plan Tab

 **Schedule** Button



MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - JOHN O ADULT(999-06-3646) | Joe Strelnik (406)494-0329

Enrollment Appropriateness **Employment Plan** Progress Funding Closures Case Notes

☐ Show Closed Services ☐ Show Closed Tasks EO Notice: [] Plan: 1 of 1

Start Date: 07/11/07 Closed: []

Onet: []

Goal: []

Justification: []

LMI []

Objective: [] Start Date: 07/11/07 [] \$ Authorize

Service: [] Hours: []

+ Add Task

- Del Task

- Del Service

End Date: [] Outcome: []

Comments: []

+ Add Service Comments Verification


Funding Summary ☐ Totals for All Plans

Source: []

Obligated: [] Authorized: [] Paid: []

Source: []

Obligated: [] Authorized: [] Paid: []

 **Schedule** Print Plan + New Plan - Del Plan Save X Cancel

Start Date of the Employment plan mm/dd/yy

Record: 1/1 ... <OSC>

The Schedule button will take you directly to the Scheduler and you can add an appointment or task. See "Daily Schedule" instruction sheets.